
Training of Catalogers and Classifiers

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TWO RELATIVELY recent questionnaire surveys, the first by E. J. Humeston¹ in 1951 and the second by Clyde Pettus² in 1952, provide a useful body of information for discussing recent developments in the teaching of cataloging and classification. It is the purpose of this paper (1) to summarize various aspects of these two surveys, (2) to review the comments of other observers and critics of the present cataloging instruction in library schools, (3) to describe in some detail the programs at Illinois and Columbia and to comment on that at Chicago, and (4) to present statements of a selected group of supervisors on the competence for cataloging of graduates of one library school. It is believed that together these approaches should serve to isolate and focus attention on some of the major problems in the current training of librarians for responsibilities in cataloging.

Humeston Survey. In a study of instructional programs in cataloging and classification, Humeston wrote to one or more instructors of the subjects in 35 accredited library schools. Humeston was interested in learning of (1) any important changes in emphasis in connection with 18 named subdivisions included in a checklist, (2) any important revisions in teaching methods, and (3) the effect of the new Library of Congress *Rules for Descriptive Cataloging* on the teaching of the subject.

In connection with emphasis, which Humeston tabulated carefully on the basis of the 18 subdivisions, it was found that a decrease in laboratory work was notable in 23 of the 30 reporting schools. Such work, of course, is part of the method, rather than a unit of the subject. Less stress was also noted in at least four schools on analytics, unit cards, and personal names. Greater emphasis was placed on nonprint materials (23 schools); the principles and theory of cataloging (20 schools); understanding the use of card catalogs (19 schools); organization and administration of catalog departments (18 schools); principles and theory of classification, cooperative and centralized cataloging, and literature and tools of cataloging (14 schools for each); subject head-

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ings and substitutes for the card catalog (13 schools for each); study and practice in L.C. Classification (11 schools); and classification systems other than that of Dewey, and printed cards (9 schools for each). Emphasis in 20 or more schools was unaltered for unit cards, personal names, corporate names, analytics, and serials.

Important changes in teaching methods included the use of opaque projectors to reduce laboratory work and hand correction of student cards, cataloging of actual collections, reading periods with one or more problems as a theme, term papers on administrative problems, panel discussions, and student introductory reports on special cataloging problems, such as the handling of music scores or recordings. One instructor conducted a survey to determine what the head catalogers of large public and academic libraries in the area expected of cataloging instructors.

Humeston reported severely contrasting opinions on the usefulness of the new L.C. *Rules*. For example, some find the illustrations helpful, but others report that they are so few in number and so poorly placed that mimeographed sheets and slides must be provided to depict many problems. Some report that the rules are easy to use—simple, concise, logical, and making the teaching of cataloging a “happier task”—but an equal number of respondents find them more difficult, less logical, ambiguous, and confusing.

Pettus Survey. Also employing a questionnaire directed at accredited library schools, Pettus was concerned with eight topics: (1) the organization of the undergraduate course, (2) preparation of the person to be considered for a cataloging position, (3) proportion of time given to descriptive and subject cataloging, including classification, (4) acceptance of the fifteenth (standard) edition of the *Decimal Classification*, (5) use of the L.C. *Rules for Descriptive Cataloging*, (6) utilization of visual aids, syllabuses, model cards, slides and filmstrips, (7) time devoted to history of cataloging and classification, and (8) extent to which discussion of the literature of cataloging and classification is included. The last two topics were suggested in an article by P. S. Dunkin entitled “Petty Codes and Pedagogues.”³ Following is a résumé of some of Pettus’ findings:

Of the 34 schools replying, six offered undergraduate courses only, while 13 maintained graduate programs alone. Fifteen schools provided both undergraduate and graduate courses. In the 21 schools reporting undergraduate courses, cataloging and classification are taught

as separate units. In the 13 schools with graduate programs, 12 offer the two topics in a single course.

Of 26 schools providing information, 18 indicated that elective courses over and above required ones were necessary for recommendation to cataloging positions. Data from 15 schools showed that 60 per cent more time was devoted to descriptive cataloging than to subject cataloging and classification. In required graduate courses, more time is given to subject cataloging.

Replies indicated that 20 out of 29 schools reporting continued to use the fourteenth edition of Dewey for instruction or reference. Of these 20, eight also used the fifteenth edition.

The L.C. *Rules* are employed in 21 of the 34 schools; eight schools use these rules for reference but follow simpler ones for problem work. Most of the institutions utilize syllabuses and model cards; eight employ slides in instruction. Attention to the history of cataloging and classification, as well as to the literature of the subjects, is provided practically everywhere.

It may be observed from the above findings that there is considerable diversity in the approach of faculty members teaching cataloging and classification. As Pettus pointed out, undoubtedly there is much experiment going on. The reorganization of curricula also has had some effect upon the content of the courses, particularly where undergraduate instruction has been introduced.

Other Observations. A study of old examination questions given to students of cataloging reveals careful attention to rules, especially as set down in the American Library Association code. Students were frequently called upon to memorize such rules, and teaching was done according to them. Laboratory drill was essential, since it was assumed that it simulated situations which develop in actual cataloging departments. There has been a tendency to get away from this pedagogical approach. Gladys Boughton ⁴ is among those who have criticized the old method of teaching "by the rules." She writes: "Today, in the study of cataloging, the beginning is made, not with the rules, not with the principles, but with the objectives of cataloging and the problems to be solved." She further notes that catalogers who are brought up on rules will continue to seek the support of a fixed statement, rather than find answers to problems in their own setting. Lucille Duffy,⁵ however, insists that rules must be learned thoroughly before catalogers can proceed intelligently.

The difficulty of resolving a controversy of this sort is obvious. Much

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depends on ingredients of the teaching program which escape surface analysis. Much also hinges on the caliber of teacher and student, and especially on the willingness of the student to think in graduate and professional terms of work, rather than in those which become college students. Miss Duffy's observation that students get their first basic course in cataloging only when they have their first job is not without truth. The important point, according to Miss Duffy, is that catalogers produced by library schools should be "aware that cataloging is a continuing process and . . . know that they must be prepared to carry on the process, if their services are to be of any practical value to their employers."

Three other observers of problems in the teaching of cataloging are Bertha Barden,⁶ Sister Frances Clare,⁷ and, as already indicated, Dunkin. Miss Barden has opposed the training of catalogers as specialists, and made a plea for more "general practitioners." She has pointed out that by the omission of routine problems and by placing less emphasis on details, cataloging can be made more appealing to library school students. She also has called attention to the possibility of introducing "preprofessional requirements," such as the study of the use of the card catalog and a "superficial survey of the Decimal Classification." Sister Frances Clare indicated that the two major implications of the new programs of library schools for cataloging were the improvement of instruction by removing those elements which were not fundamental to professional consideration, and the expansion of a cataloging course so as to devote more emphasis and time to the advanced study of cataloging problems.

Dunkin, highly critical of the New Codes, bases his convictions on the declaration that "Crisis demands not a restatement of tradition but a brand new outlook." Instead of a veneration for tradition, catalogers should develop a "creative scepticism." He opposes the old form of drill and attention to technical details, which detour students from concern with the real problems of cataloging. He fails to see any innovations in current courses, even if they have been given such titles as "organization of materials" or "bibliographical control." His proposed program of instruction would involve, in addition to other things, introduction to principles in a few lectures, using audio-visual aids, and actual cataloging in libraries which will work in cooperation with the library schools. He suggests building master's courses around two general themes, namely, the history of cataloging and classification, and a survey of cataloging and classification theory. Dunkin believes that a

plan such as he describes will relieve the teacher of the burden of revision, reduce the number of offerings needed, give the instructor time to keep up to date with developments in cataloging, allow him to gain practical experience in different kinds of libraries, and provide him with the leeway to carry on research, to ask questions, and to think.

Evidence that the training of catalogers is considered important by administrators is found in observations by Jerrold Orne,⁸ Quincy Mumford,⁹ and F. H. Wagman.⁹ Orne, presenting the viewpoint of an academic library administrator, noted that in general courses have been modified very little, although with perhaps more emphasis being placed on principles and theory. He called attention to the fact that present day texts, such as the *L.C. Rules* and the *A.L.A. Rules*, are so organized that the teaching of principles rather than method is required. Orne also observed that changes in cataloging methods, such as centralized cataloging in the Veterans Administration and the St. Louis County Library, justify different curricula in different schools, and that a premium is placed on understanding. Orne also indicated that librarians themselves would still have to be trained in the style of the individual library.

Mumford, who based his remarks on experience at the Cleveland Public Library with approximately twenty-five recent graduates, suggested that perhaps too much was being crowded into the new curricula, and that students cannot understand and apply research without the comprehension which comes from practice. As a corrective device he proposed that they write a required thesis in the second year while not in residence, or that supervised field practice be substituted for the research paper. Wagman, of the Library of Congress, pointed out that at present it is difficult to assess catalogers or compare them with those of the past. Since there is no possibility of setting up a control group, judgment is likely to be subjective.

Illinois and Columbia Programs. Two recent studies by Kathryn Luther¹⁰ and Thelma Eaton¹¹ describe in some detail the cataloging courses at the University of Illinois. The new program differs from earlier ones in that cataloging is primarily an elective subject and that the amount of drill has been reduced. Two types of courses are offered at Illinois: (1) the so-called practical courses, those designed to teach students to produce catalogs and to classify collections, and (2) courses designed with the view of examining classification and cataloging from an historical point of view and making a critical study

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of catalogs and classification schemes. Courses in the first group are prerequisite to those in the second. The background desirable for cataloging includes undergraduate preparation and complementary library courses, languages, knowledge of words, familiarity with books, knowledge of reference work, and principles of library administration.

The basic course, on the undergraduate level, does not prepare the student to be a cataloger, but provides him with a foundation for the further study of cataloging. It is "an integrated approach to cataloging and classification." Emphasis is on the mastery of the tools that must be used in actual work. The card form is the first unit of study. An introduction to corporate entries is given, but no practice. Principles of classification are taught, and the physical aspects of Dewey are stressed. Memorization of Dewey numbers is reduced to such parts of the schedule as might be serviceable to librarians working in service departments of the library. Subject headings are introduced, and some time is devoted to the problems commonly encountered of adjusting existing codes and schedules to meet the needs of a given library.

The second cataloging course at Illinois proceeds to more advanced work, "to more complicated author entries, to more corporate entries, to serials as well as books, to extended drill in the Dewey Classification, to an introduction to the Library of Congress Classification, and to much more practice in subject headings." Also, there is study of existing policies as established by libraries of various sizes, and an evaluation of the work of cataloging departments. Codes are applied to given situations. The Dewey and L.C. classifications are used in practice. Students who complete the course are considered to be qualified as competent catalogers.

In the third course, two-thirds of the semester is spent on the cataloging and arranging of special types of materials. The remaining part is devoted to problems of administering a catalog department.

At Columbia, the effort has been to relate the courses in cataloging and classification to the entire professional curriculum. Methods, including cataloging and classification, comprise one of the four major areas of study, the other three being foundations, readers and reading, and resources or materials. There are other courses on either a required or elective basis.

The methods area of the professional program includes two courses, i.e., a survey entitled "Technical Services," and "Organization of Materials." Actually there have been introduced in these many aspects of librarianship which were included formerly in such courses as College

and University Libraries, Public Libraries, and Special Libraries. Some material which was once taught in the second year is included, since it is believed that most of the students will come to think of the professional program as terminal, and all should have some familiarity with the basic problems librarians have been wrestling with for many years.

The content of each of these courses may be examined. In the survey course, which entails primarily lectures and readings and has discussion groups meeting once a week, students become acquainted with the problems involved in acquiring books and other materials for libraries and preparing them for the shelves. They are guided to think in terms of acquisitions, cataloging and classification, binding, preservation, and photography. There is also included a unit on the methods of circulation work.

In the cataloging and classification portions of this survey course, efforts have been made to lead the students to an understanding of the following:

1. Functions of cataloging.
2. The differences among certain types of catalogs.
3. Relation of book catalogs to card catalogs.
4. Different arrangements of catalogs.
5. Understanding of basic differences in filing codes.
6. The idea of personal authorship.
7. The idea of corporate authorship.
8. The recognition problem of entry for anonymous works, pseudonymous works, foreign names, governmental publications, Bible, ecclesiastical titles, and similar entries.
9. The various kinds of added entries, i.e., those by subject, title, and name.
10. Distinction between bibliography and cataloging.
11. Elements of descriptive cataloging (introduction to L.C. *Rules for Descriptive Cataloging*).
12. Recognition of approach of different kinds of users (research, school, public).
13. Idea of subject entry.
14. Recognition of aids to subject cataloging, such as lists.
15. General practices of subject cataloging.
16. Subject cataloging for different kinds of users.
17. Essential records in subject heading work.

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18. General principles of classification.
19. Relation of classification to subject cataloging.
20. Aids for classifiers, such as shelf list, and codes.
21. Classification in different types of libraries.
22. Relation between cataloging and acquisition departments.
23. Understanding of such matters as inventory, reclassifying and recataloging, union catalogs, cooperative cataloging, selective cataloging, simplified cataloging.
24. Cataloging problems in branch and departmental libraries.
25. Understanding of some of the problems in operating a catalog department (e.g., use of printed cards, reproduction of cards).

These represent a long list of concepts that the instructor must be concerned with in a relatively brief period, especially since time is also devoted to the other technical services. Limitations applying to lectures, class discussions, exhibits of certain forms and other materials, readings, and examinations (even if these are rather comprehensive) have suggested that the course would be more effective if there were available certain additional tools. Among these are a comprehensive manual on practices and problems in technical services, which is in process of compilation, and well-worked-out slide materials and appropriate motion picture films. There should be available also a laboratory where new methods and machinery could be tested and exhibited.

The course on organization of materials in libraries is primarily concerned with subject cataloging and classification. It consists of two main parts: (1) classification and subject cataloging, and (2) special problems of entry.

In the first part attention is given to such topics as the process of classification and the properties of classification systems, particularly L.C. and Dewey; and the procedure of assigning subject headings and the properties and limitations of subject heading lists, including Sears, L.C., and such special lists as those of Clyde Pettus and M. J. Voigt. After general introductions there are three units concerned with the application of principles of subject analysis to actual titles (1) in humanities and fine arts (using literature and the N class of L.C.), (2) in social sciences, using the economics division in Dewey and L.C. and that of history in the two classifications, and (3) in science and technology, using chemistry and engineering classes in Dewey and L.C. as points of orientation. It is expected that students will get some help in understanding the nature of the materials in each of the major

subject divisions of knowledge through the resources courses which they take concurrently. They are required to work on from twenty to twenty-five titles in each of the major divisions—assigning Dewey and L.C. class numbers, and adding subject headings and references. The problems are spaced one or two weeks apart, with periods for discussing difficulties met in the work.

In the second part of the course attention is given to the relationship between bibliography and cataloging. Here the class draws upon knowledge acquired in the reference and bibliography course and in the resources courses. Particular stress is laid on the difference between bibliographical entry and cataloging entry. The catalogs of the Library of Congress, the British Museum, and the Bibliothèque Nationale, and the *Gesamtkatalog*, and the Wing and Pollard and Redgrave lists, together with the Surgeon-General's catalogs and similar tools, are brought into the instruction.

In this part of the course time is devoted also to a more detailed study of anonymous and pseudonymous works, anonymous classics, difficult types of names (such as foreign names and changed names), and manuscripts. There likewise is concern with entries for serial publications, and with the organization and cataloging of governmental publications, maps, music, and films. Attention too is given to the cataloging of materials emanating from European countries, and for those in non-Roman alphabets. Finally, the general practices in simplified cataloging are clarified.

At Chicago, instruction in the elements of cataloging and classification is part of a general course captioned "Interpretation, Evaluation and Use of Library Materials." Problems in cataloging and classification are taken up also in courses dealing with the several major subject areas, i.e., social sciences, humanities, and natural sciences. There is in addition a course known as "Advanced Cataloging and Classification," which concerns the treatment of special materials, the Library of Congress Classification, and principles of organizing and administering catalog departments. A seminar entitled "Theory and History of Classification" involves "Examination and criticism of the major systems of classification from the earliest times to the present with particular emphasis on their influence upon the classification and subject cataloging of books."¹²

Examination of the programs for cataloging instruction in library schools suggests that there is at present some desirable variation in

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approach. The literature also indicates an effort on the part of teachers to prepare graduates so that they will be able both to interpret catalogs to users and to prepare entries that are adequate for the purposes of a library. There appears too to be increasing concern for the catalog as one of the several means of gaining access to the contents of libraries. Finally it may be noted that there is a definite effort on the part of instructors, as well as by the Library of Congress and other libraries, to produce manuals, textbooks, and codes which will be useful both for pedagogical and practical purposes.

Observations on Graduates. A systematic study of the graduates of a school furnishes one way of judging a teaching program. The evaluation, of course, should take into consideration certain important factors relating to the individual, such as his background, experience, language facility, feeling for accuracy and details, ability to discriminate in treatment of materials, patterns of work, promptness, and general liking for cataloging. Last year, in preparation for a program on the teaching of cataloging, letters were written to eight librarians who had worked with twenty-six recent graduates of the Columbia University School of Library Service, all of whom had gone into cataloging full time or had been called upon to use their knowledge of cataloging in other services. The replies were generally along the lines one would expect. Those students who exhibited a marked interest in the principles and theory of cataloging in class work and in their achievement on problems usually were praised by their supervisors. Those who had demonstrated toleration for cataloging as a course and had performed on a minimal level were criticized by their supervisors as not being careful with details, as lacking knowledge of certain records, and as having difficulty translating theory into practice.

The head cataloger of a large library in a special subject field made the following pertinent remarks about a cataloger:

Mr. S—— compares very favorably with earlier graduates of Columbia in his preparation for the work of the section. He seems to have a good understanding of both cataloging principles and practice. He seems to know his rules adequately, and does not refer to them any more often than other beginning catalogers, including those trained under former methods. He seems also to have a good foundation for his subject work, judging by his work and his comments. His reviser finds no lacks in his training, and my observation bears this out. To what extent this is due to Mr. S——'s own efforts, we cannot say. He admittedly concentrated on cataloging, and enjoyed it. We believe, too,

that he has considerable native ability. In short, he came to us quite adequately prepared for cataloging.

It may be added that much depends on the orientation program of a library as well as on the quality of the student. In the time at present allotted to cataloging and classification library schools cannot teach all possible variations in descriptive and subject cataloging and in classification. The extent to which a library staff is able to absorb new personnel smoothly, the atmosphere of cooperation and assistance, the existence of staff manuals and recorded decisions, and the organization of facilities for work, all are important, therefore, in making the most of the potentialities of newcomers. Especially if a library departs widely from standard practice, it will need to take an active part in training, and to allow more time to adjust the beginner than would be necessary otherwise. As in other professional fields this kind of guidance can be most productive if the new appointees have had prior relevant experience, or possess special knowledge, or are aware of the purposes, principles, and current thought pertaining to their work, or are flexible in fitting into new situations; but it is essential even under the most favorable conditions.

It is fitting to close this discussion with an observation made by the late Pierce Butler¹³ in a paper presented before the Ohio Valley Regional Group of Catalogers. The activity of the cataloger in the field of bibliography is important, noted Butler, but it is not an end in itself. The effective cataloger is always a librarian first. This is the point of view that some library schools have taken in recent years.

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